

The background of the cover is a photograph of a beach scene. In the foreground, there are dark, silhouetted rocks or dunes. Behind them, white waves are crashing, creating a large spray of water. The sky above the waves is a deep blue, transitioning into a lighter blue and then a soft orange and yellow glow in the upper right corner, suggesting a sunset or sunrise. The overall color palette is dominated by blues and oranges.

State of California

1995/1996 Marketing Plan

California Division of Tourism
(California Tourism)

California Technology, Trade & Commerce Agency
Lon S. Hatamiya, Secretary

March 1, 1995

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SITUATION ANALYSIS

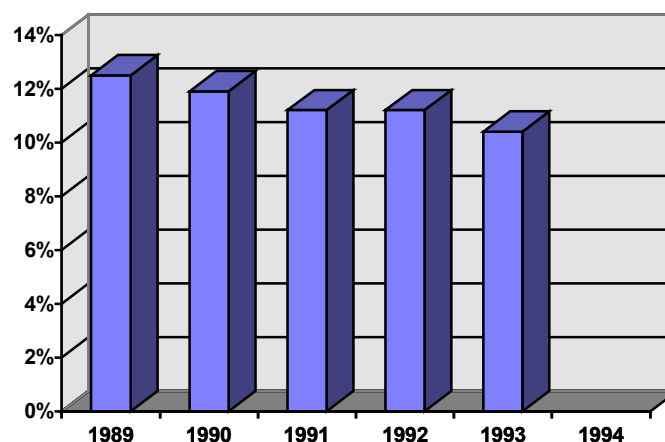
Tourism is arguably California's leading industry when measured in terms of combined consumer spending, employment and tax revenue. In 1994, the latest year measured, it contributed \$55.7 billion in expenditures to the state's economy, generated \$2 billion in state taxes, \$1 billion in local taxes and employed 691,000 Californians, second only in employment to health care.¹ Travel and tourism-related jobs account for approximately 6.5 percent of the Gross State Product.

California is the number one travel destination in the U.S., both in domestic and international tourism. In 1994, California overtook Florida, recapturing the number one position as the most visited state by international travelers to the U.S. To demonstrate the enormous size and contribution of travel and tourism to California, travel spending here is 50% greater than in Florida, four times larger than in Nevada, and seven times bigger than in Hawaii.² It is a stunning fact that there are more hotel rooms in Los Angeles County alone than in the entire state of Hawaii.

287 million person trip visits were taken within California in 1994, up 7.4%. 190 million (71%) of these trips were for leisure and 78 million (29%) were for business purposes. California residents took 82% (234 million) of all leisure trips in the state. However, out-of-state visitors (including other Americans and international travelers) comprised 19% of all trips taken within California (53 million trips). Out-of-state visitors, though they represent less than 20% of all travel within the state, spent at a much high per capita level and brought new money into California. For these reasons, out-of-state travelers get much higher attention within this marketing plan. Out-of state visitation was comprised of 42 million trips by Americans (15%) and 11 million trips by international visitors (4%).³

Of concern in the past six years is that the rate of tourism growth within California (though still growing) has slowed considerably and California's position as the number one destination in the U.S. has been eroding. As shown in the following table, in 1989 12.5 percent of all Americans traveled to and within California, but by 1994, only 10.4 percent visit our state, a loss of 16.8%.

California's Share of U.S. Domestic Leisure Travel



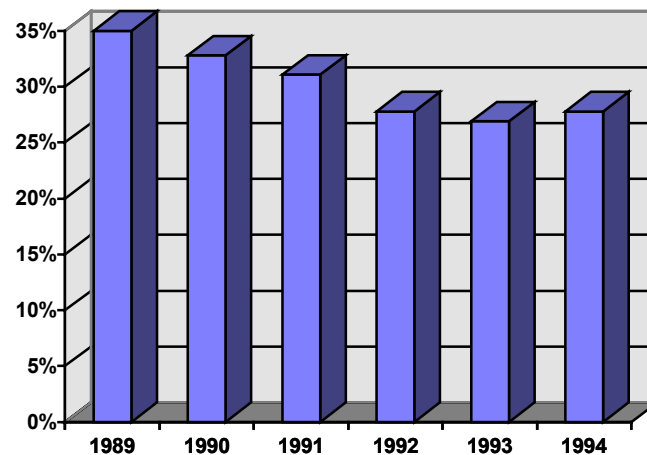
¹California Travel: Its Economic Impact, California Division of Tourism, March 1994.

²US. Travel Data Center, 1994

³Domestic Travel to California. D.K. Shifflet & Associates, 1994; Overseas Visitors to California. CIC Research, Inc., 1994; U.S. Travel and Tourism Administration.

This loss in market share equated to an annual loss of \$2.75 billion in travel spending, \$104 million in state taxes, \$50 million in local taxes collected and 34,000 fewer jobs, just because California did not protect and sustain its 1989 share of domestic leisure travel.

California's Share of U.S. International Leisure Travel



The problem isn't just a domestic one. California lost share of international leisure travelers consistently from 1989 through 1993, though as previously mentioned, we recovered share in 1994. Positive gains in volume and share were obtained in 1994 from Belgium, Denmark, Germany, Ireland, Italy, Netherlands, Norway, Spain, Philippines, Eastern Europe, U.K., Caribbean, South America, Chile, Columbia, Australia, Argentina, Central America, and Hong Kong. Though, California lost share from to other states from: New Zealand, Switzerland, Sweden, and Korea.

Four principle factors have caused California to lose domestic and international share of tourism during the past few years:

1. Increased competition from other states
2. Insufficiently funded statewide tourism marketing that would otherwise keep California top-of-mind among consumers and the travel trade
3. The effect of highly publicized disasters and crimes on California's attractiveness as a travel destination, and
4. California's inability to keep itself trendy in the minds of travelers.

A solution to these factors is provided with implementation of the California Tourism Marketing Act process beginning this fiscal year.

MARKETING STRATEGIES

The California Division of Tourism (CalTour) marketing plan is divided into three major marketing programs: in-state, domestic and international marketing. Within each of these programs are major elements that can cross over to other programs. That is, the Ski California element (which began as an In-state marketing program) now applies to all three programs: in-state, domestic and international.

These programs utilize a variety of marketing tactics, such as: research, advertising, publicity, promotions, direct marketing, sales missions, trade shows, collateral, fulfillment and special events. These tactics often apply to one or more programs.

The California Tourism Policy Act of 1984 specifies that the California Tourism Commission (CTC), in cooperation with CalTour and the Trade and Commerce Agency, adopt and annually update this plan.

The plan, to the extent practical and feasible, is intended to:

1. Serve as a guide for effectuating the California Tourism Policy Act with available resources,
2. Include an assessment of the activities and accomplishments of CalTour (in annual report),
3. Outline the intended program of tourism promotion and visitor service activities for the upcoming year,
4. Delineate the ways, means and programs by which tourism shall be promoted, including any cost-effective marketing methods and techniques to be employed,
5. Identify resources as are reasonably necessary from all sources both public and private, to accomplish these promotion and marketing activities,
6. Identify and articulate cooperative or shared cost programs, or opportunities for these ventures, with private entities,
7. Identify licensing opportunities, including licensing agents, and
8. Contain other information, data or recommendations that may be germane to the marketing efforts of California pursuant to the intent of the Policy Act.

Public-private cooperative efforts in trade development, advertising, promotions, regional marketing and other aspects of the plan have been included, where practical, in order to extend the purchasing power of CalTour's budget.

The fundamental objective of this plan is to promote travel to and within the State of California.

The following marketing strategies support that objective. The CTC has decided (supported by general consensus within California's travel industry) that CalTour's responsibility should be to conduct tourism marketing that individual businesses and destinations within the state could not do, as effectively, on their own. Generally, this involves promoting the concept of California as a single travel concept, although to do this CalTour utilizes specific "travel typologies" (family travel, romantic getaways, recreation and sports, nature, and Multicultural experiences) or the diversity within California's tourism regions to promote travel within the State.

When marketing within California, the CTC has established the general strategy of promoting travel to California's lesser-known and under-utilized destinations. When marketing outside California, the CTC has directed CalTour to promote travel to all California destinations.

The CTC has directed that international and domestic markets for California be developed, with emphasis on markets which bring new tourists and, thus, new revenue into the State. The State of California serves a critical role in the industry's ability to tap these lucrative and growing markets, in that it often opens relations and lines of business with these new markets or provides a broader dimension to the industry's own marketing activities. This can give California travel businesses a competitive advantage to travel businesses in other states and destinations.

CalTour also serves as a catalyst to bring together the State's competing businesses and destinations to work together for the greater purpose of attracting visitors. At times, CalTour's investment on a given program element is minuscule compared to the industry's. On the Ski California element, for example, CalTour provides \$180,000 in funding and the industry contributes \$500,000. Yet, the industry would never have raised the \$500,000 had it not been for the leadership, vision, equity and financial contribution of the State. Similarly, the \$10,000 per rural region provided as seed money for regional marketing, as stimulated additional investment by communities and businesses throughout these regions. Without CalTour's involvement, the regions would quickly split into competing marketing groups, resulting in confusing messages to travelers and lowering visitation to California.

California tourism icons, such as the Golden Gate Bridge, Disneyland, Half Dome, and The Hollywood Sign®⁴, among others, are extremely valuable in stimulating recognition and purchase of California vacations, so they are used more often than other California symbols in attracting visitation.

Just because a destination is successful or highly recognized does not eliminate it from being promoted within the State's marketing program. In fact, just the opposite may be needed in order to effectively sell travel to California. Likewise, just because a destination is little-known or unrecognized does not eliminate it from being promoted within the State's marketing program, either. New destinations may be just as useful in stimulating travel to California.

CalTour is open to criticism whenever it singles out a particular destination or business for attention, but to be effective, this is often required. It is impossible for CalTour to identify every place or business in CalTour marketing activities. California is just too big. However, CalTour attempts to be fair and balanced in its representation of all regions, destinations and attractions within California, but it is not always possible or productive to identify every city, region or attraction within the state. At times, it may be counterproductive to do so. The objective of this program is to effectively market travel to and

⁴ "The Hollywood Sign" is a registered trademark of the Hollywood Chamber of Commerce and is used with permission whenever seen in CalTour communications and marketing.

within California. To best accomplish this, decisions on what to identify or what works best for the given market is left to the professional judgment of CalTour with review and approval by the CTC.

FY 1995/96 overall goals and objectives include:

- To stimulate positive, top-of-mind awareness of California as a "premiere" travel and vacation destination among key targeted geographic, demographic and sociographic markets, in targeted areas of the United States, Canada, Mexico and overseas.
- When marketing to audiences within California, CalTour focuses upon adults, aged 25-plus, with household income exceeding \$35,000; when marketing outside California, CalTour focuses upon adults aged 35-plus, with household incomes of \$50,000.
- To encourage, persuade and motivate these "target markets" to select California as their travel and/or vacation destination.
- To serve as a catalyst in developing strong public/private partnerships to promote tourism to the State, via the execution of marketing programs designed to achieve the mutually beneficial objectives of all participants - public and private.
- To maximize the addition of the private sector investment. This is a valuable effort which gives the State maximum impact for dollars invested.
- To serve as a catalyst in securing California tourism industry involvement in selected domestic and foreign travel trade shows. Many regions, smaller chambers and convention bureaus and attractions can now market to an international audience because of this State effort, making trade show attendance economically feasible.
- To communicate with California's tourism industry, the media (domestic and international), and the travel trade. This facilitates effective planning and participation on the part of the private sector.
- To measure and assess marketing effectiveness and impact. The State does not have a "main gate" or "ticket counter" at which to measure sales, so other methods, such as visitor characteristic studies, visitor impact studies, pre/post research focus groups and coupon redemption is used to assess effectiveness.
- To stimulate travel to lesser-known and underutilized destinations and work with these destinations in the development of regional tourism marketing programs.
- To serve as a marketing umbrella for California as a year-round vacation destination. The State's role is to promote travel to and within California. In accomplishing this, CalTour does not replace the private sector's efforts in marketing individual destinations and businesses within the State, but complements these marketing efforts.
- To generate private-sector support to assist the State in communicating California's unique offerings and attractions.
- To educate and motivate the travel trade via sales missions, familiarization tours (fam tours), educational seminars and sales calls promoting California in targeted markets.

ECONOMIC DEVELOPMENT

CalTour is mandated within Section 15364.51 of the Government Code to "encourage investment in new tourism facilities and renovation of older facilities." In light of that mandate, CalTour works with other divisions within the California Trade and Commerce Agency (TCA) to encourage tourism expansion and retention. Following are projects supported during 1995/96:

Westcot, Anaheim

The Walt Disney Company continues to be undecided about building a new resort hotel and theme parks complex near Disneyland. The new complex (called Westcot) would contain a standing world's fair, similar to Epcot in Florida, a third theme park and resort hotel properties. \$90 million in new state tax revenues would be generated from increased tourism. In addition, the expansion is anticipated to generate \$2.4 billion annually in additional economic activity in the five-county Southern California region. CalTour has participated in planning sessions and TCA Red Teams.

Gold Rush City, Lathrop

CalTour continues to meet with developers regarding this \$4 billion development which would employ 28,000 and involve sites for two major theme parks and other amusement attractions and marinas, golf courses, hotels, shops, restaurants, sporting and office complexes and housing developments on the delta, south of Stockton.

Native American Indian Cultural Center, Tustin

Activity related to establishing a living history theme park of American Indian villages and a university for native-Americans in Orange County has stalled. CalTour remains accessible to the developers and project proponents to assist where needed.

Treasure Island, San Francisco

CalTour continues to advise the San Francisco Redevelopment Agency and others involved in evaluating possible tourism uses for U.S. Naval Station Treasure Island.

Entertainment USA, Temecula

CalTour continues to assist this approved project with follow-up, including adding it to post trips related to Pow Wow Los Angeles in Spring 1996.

Legoland, Carlsbad

CalTour continues to assist Lego World A/S in the development and placement of a children's theme park in Carlsbad, including participation in the planning committee and addition of the site to post trips related to Pow Wow Los Angeles in Spring 1996.

Leimert Park, Los Angeles (Crenshaw District)

CalTour continues to assist this project with introductions and guidance related to obtaining financial support for establishing an African-American cultural tourist district in South Los Angeles at the Crossroads Arts Academy and Vision Complex.

ISSUES MANAGEMENT

The California Division of Tourism often serves as an intermediary between the travel industry, Wilson Administration, State legislature, federal agencies, and local organizations on a variety of tourism issues. Anticipated issues in the coming year, include:

- California Tourism Marketing Act Clean-up Legislation
- California Sesquicentennial License Plate Bill
- White House Conference on Travel and Tourism Follow-up
- Rental Car License Fee Bill
- Cruise Ship Gaming
- Passenger Services Act of 1886
- US/Japan 2000
- California Conference on Tourism
- California Tourism Awards

California Tourism Marketing Act

Implementation of the California Tourism Marketing Act requires CalTour to provide staff support to the Tourism Selection Committee identified within the act and to conduct public meetings necessary for the collection of information to be used in the Selection Committee's deliberations. Funds have been taken from other parts of the Marketing Plan (mostly advertising and promotions) to provide for these services. The funds are allocated as follows: \$50,000 research, \$25,000 for legal services, \$75,000 for administrative services and \$105,000 for public meetings.

Budget

CalTour: \$255,000

Western States Tourism Policy Council

Objectives

- Study tourism issues of importance to western states
- Issue reports on tourism issues of importance of western states
- Seek Federal understanding and actions in support of tourism issues important to western states

Description

California joins Arizona, Alaska, Hawaii, Idaho, Nevada, Oregon and Washington in financing the Western States Tourism Policy Council for the purpose of assuring that tourism issues of importance to these states are studied and communicated to government and the public.

Measurement

Subjective evaluation of effectiveness of WSTPC.

Budget

CalTour: \$10,000

CRISIS RESPONSE

One aspect of this marketing plan that we'd prefer not to do is respond to crises. Since Governor Wilson took office in 1991, every county in California has been affected by one or another natural or civil disaster, resulting in declarations of emergency being necessitated in every one of California's counties at some time during the Governor's term. 1994 was no different. Major winter storms deluged numerous California counties resulting in the need to implement CalTour's Crisis Communications plan once again. CalTour has become so schooled in responding to crises, that the Director and Media Relations Manager keep copies of the Division Crisis Communications plan on hand 24-hours a day to be exercised in the event of another crisis. This involves gathering facts and disseminating factual information to consumers and the travel trade to suppress rumor and unfounded fears, to sustain tourism where travelers are not threatened and to recover tourism quickly in areas where disaster has occurred. Also, CalTour has served as advisor to affected areas providing guidance that can be useful in recovering quickly and to seek external assistance in the form of grants or action. California's Crisis Communications plan is so respected that it has been distributed by USTTA to other states to emulate.

RESEARCH

Research is an integral part of any marketing program. Because the California Division of Tourism must be held accountable for the expenditure of public dollars, research undertaken by CalTour has even greater relevance to program activities.

Through its research program, CalTour develops and disseminates quantitative data and analyses demonstrating the impact of tourism in California, identifying markets and trends, and validates the effectiveness of State tourism marketing programs.

Additionally, CalTour provides research assistance and statistics to California companies and destinations, as well as program support to other Divisions programs in presenting findings to the State Legislature, travel industry and agencies of state and local government. Division staff consults frequently with academicians and specialists nationwide on ways to improve research methodology, data reliability, and to identify opportunities for cooperative projects.

Economic Impact Analysis

The California Tourism Policy Act requires that CalTour document the relative growth or decline of travel spending, employment, payroll, and state and local tax revenues. CalTour is the only publicly available source of this data for California. The Division also compiles data on tourism-related impacts at the county level.

- *California Travel Impacts by County, 1994 and Preliminary Statewide Estimates, 1995 -* Using an econometric model, CalTour develops state and county travel expenditure estimates broken down by category of expenditure and by type of accommodation used by travelers. The contribution of travel and tourism to the overall state economy is also analyzed and charted. This report is widely used by local and state agencies, visitor bureaus and chambers

of commerce, hotel developers, appraisers, planners, and lending institution as a reliable, unbiased source of travel trend data.

Budget

CalTour: \$53,400

Program Evaluation/Return on Investment

Each of the hundreds of programs and activities undertaken by the Division every year has specific objectives and desired outcomes. It would be ideal if the state were able to determine how many visitors came to California as a result of these programs and how much spending was generated. Comparing total program costs with the benefits to the state in terms of tax revenues from visitor spending would then yield the state's Return on Investment(R.O.I.). However, because of the diversity of the programs in this marketing plan and since the Division does not actually sell any tickets to travelers or book any trips, there is no single mechanism for tracking visitor volumes directly attributable to state initiatives.

Research efforts continue to seek the development of credible measures of R.O.I. Some evaluations are formal, others are informal, depending on the type of outcome expected. Evaluations will include expenditures and job estimates linked to specific programs, such as literature and fulfillment, whenever feasible, but will also include other indirect measures of program effectiveness, such as awareness and interest in traveling to California.

- *1996 Advertising Effectiveness Study* - The study will begin in February 1996 prior to the launching of California's Spring ad campaign. Final results of three survey waves will be presented in early Fall.
- *Focus Groups* - Focus groups are planned for Chicago and Seattle, two primary markets representing the different characteristics of short haul and long haul traveler. Consumer reactions and expectations regarding the faxed Tip Sheets used to generate trip ideas during the Spring campaign will be explored. Responses will guide design and content of future Tip Sheets.

Budget

CalTour: \$62,400

Domestic Market Research

The Division of Tourism compiles and disseminates detailed demographics and trip characteristics of domestic visitors to California. This information is needed by new businesses and investors exploring the market potential of visitor-related products and services, existing businesses considering expansion, organizations planning advertising and marketing campaigns, and by governmental agencies assessing the demand placed by visitors on public services and facilities.

- *1994 Domestic Visitors to California* - Based on a syndicated monthly travel survey of over 30,000 U.S. households.

- *Monthly Monitor of Domestic Travel to California* - Monthly and year-to-date bulletins on current domestic travel patterns.

Budget

CalTour: \$35,800

International Market Research

International visitors contribute over \$12 billion to the state economy annually and account for as much as 20 to 30 percent of the business at many of the state's hotels, motels, and attractions. The Division conducts primary and secondary research, supplementing available data with special studies as needed.

- *1995 Overseas Visitors to California* - CalTour obtains data directly from the *Inflight Survey of Overseas Visitors* conducted on behalf of the U.S. Travel and Tourism Administration (USTTA).
- *Monthly Monitor of Overseas Travel* - Monthly data on Los Angeles and San Francisco arrivals from key overseas markets. Reported in Travel Barometer
- *Mexican Air Travel to California* - An analysis of California-bound air travel from Mexico, also overseen by USTTA.
- *Canadian Air Travel to California* - Cooperative venture between USTTA, Statistics Canada, and participating states.

Fact sheets and market highlights are prepared and updated as needed for conferences, workshops, briefings, and other purposes.

Budget

CalTour: \$33,000

Research Communications

To communicate research findings to the state's travel industry, students and educators, and the public, CalTour produces a quarterly tourism research newsletter, provides its studies on the internet and issues other periodic reports. These communications contain research findings, excerpts from research journals, trends to watch, and feature articles on topics relating to domestic and international research methodology and findings to assist them in better promoting travel to California.

- *Research Insights* - A quarterly newsletter containing recent findings; summaries of articles, reports from other publications, marketing implications and new studies.
- *California Travel Barometer* - Most currently available indicators relative to domestic and international travel, such as: airport arrivals, highway volume, park visitation, etc.
- *Internet* - California tourism research studies will be added in 1995/96 to CalTour's internet address, to provide easier access for California's travel industry and the public.

Budget

CalTour: \$49,000

COLLATERAL AND FULFILLMENT

Perhaps CalTour's most essential function is to develop and disseminate information about California to travelers and the travel trade. This is done through publication of collateral materials, such as: a general visitor guide, a travel trade guide, a quarterly magazine, regional brochures, a state map, a ski guide, and a guide to unusual adventures throughout the state. Distribution, or fulfillment, is made through the use of a toll free telephone number, response by mail and "fax on demand," and the internet. Requests for visitor information are stimulated mostly by CalTour advertising. As reported earlier, San Francisco State University conducts a rigorous study of the cost effectiveness of this program.

California Tourism Publications

Background

In spring of 1995, CalTour was advised by its publisher, MH West, that it was purchased by a firm that did not wish to continue publishing travel and tourism oriented consumer and trade publications. This placed CalTour in an extraordinarily threatening position, as the announcement came right at the point MH West was in the middle of its advertising sales efforts and because there was little opportunity to replace MH West with another publisher. This would have left California with no travel and tourism information to provide to consumers and the trade beginning in 1996, creating a potential for loss of millions in revenue to the State and its travel industry.

The General Services Agency, recognizing the enormous financial consequences to California of this situation, came to the rescue and authorized CalTour to issue an RFP that would allow speedier approval of a publisher to replace MH West, than would normally occur through the regular contracting process. A general bid was issued to various publishers and Meredith Publishing Services, publisher of such well-known consumer service publications as *Better Homes and Gardens*, *Ladies Home Journal* and *Traditional Home* was awarded a three-year contract. Meredith then established a new company in California called "California Tourism Publications" to produce the State's tourism publications. As a result, California will have "new and improved" travel and tourism information in 1996. This includes the following:

California Visitor's Guide

Objectives

- Publish 400,000 visitor information guides (up 33%) for people planning trips to California
- Provide a consumer guide that stimulates interest in visiting California and that helps travelers plan their trips to and through California.
- Showcase the vacation opportunities available in all regions of the State.
- Identify the four major vacation typologies preferred by California travelers: family fun and sun, romantic getaways, nature outings and recreation-based trips.
- Promote extended length of stay by providing comprehensive trip-planning information.
- Provide the travel industry and its many components with opportunities to identify their products and services through advertising and listings.
- Create publications that reflect California's distinctive style and culture.

Description

The *California Visitor Guide* is a comprehensive directory to visiting our state including sections describing each region of the state as well as specific sections about family, romance, nature and recreation trips. It includes visitor information sources, points of interest and regional maps. 400,000 guides will be printed and distributed as the State's flagship fulfillment piece.

Measurement

300,000 copies are distributed annually through Welcome Centers, USTTA offices, the travel trade, tourist information offices throughout the State, and trade and consumer shows.

Budget

CalTour: \$0
Private Sector Contribution: Advertising supported

California Travel and Incentive Planner's Guide

Objective

- Provide 85,000 travel agents, tour operators and meeting planners with a comprehensive reference piece on California better "sell" their clients on vacationing and meeting in California.

Description

This 200-page guide provides information on the 12 regions of California, lists ground tour operators, accommodations and group rates, suggested tour itineraries and visitor information sources.

Budget

CalTour \$0
Private Sector Contribution: Advertising supported

California Travel Ideas Magazine

Objective

- Provide two million motorists entering California at Agricultural Inspection Stations with a magazine about visiting the state that provides for a more positive introduction to California and encourages them to explore the State more fully.

Description

This four-color, 50-page, inexpensive magazine is produced under a cooperative agreement with the Department of Food and Agriculture's Pest Exclusion Branch. It is distributed at Agricultural Inspection Stations along the State's border, though the publisher is seeking additional distribution points.

Budget

CalTour: \$0
Private Sector Contribution: Advertising supported

California State Map

Objective

- Provide California state road maps to travelers planning trips to California.

Description

A map is the most highly requested item produced by CalTour. For the past two years, Sunset Publishing has produced, at no cost to the State, 300,000 copies of a map of California for distribution to people planning trips to California. In this year, California Tourism Publications will take over production of the map and insert 400,000 maps in the *California Visitor Guide*

Budget

CalTour: \$0
Private Sector Contribution: Advertising supported

Student Packets

Objective

- Provide grade school children who write to the State of California with solid information to help them write their reports about California.

Description

In every grade school in America, children are assigned to write to state governments and request information. The California Division of Tourism receives 40,000 such requests, each year. Additional requests are received by the Secretary of State and Governor's offices. Responding to these children has little to no value in stimulating tourism within the state. However, not responding quickly and fully to the children's inquiries creates a public relations black eye for California. Although this does not satisfy the Legislature's intentions in funding CalTour and although it reduces the funds available to conduct tourism marketing, CalTour can see no other acceptable alternative but to provide specialized packets to school children.

CalTour has located a supply of educational pamphlets intended for student use that are produced by the Secretary of State's office. CalTour will purchase a supply of the booklets until which time as California Tourism Publications can develop an advertising-supported replacement.

Budget

CalTour: \$5,000

California Special Events

Objective

- Provide visitors reasons to travel throughout California.
- Identify California's ethnic events and encourage visitation to them.
- Heighten interest among consumers to tour the California Countryside.

Description

In 1992, CalTour's Special Events calendar was combined with an Ethnic Calendar for the purpose of reducing cost and duplication and increasing exposure and consumer interest in ethnic events. The resulting product was a high-quality, 30-page guide listing more than 600 of

California's special events and ethnic festivities. The 1993 Special Events calendar was further expanded by the addition of numerous arts events throughout California, increasing the number of listings to more than 1,000 events. In 1995, the publication's appearance was greatly improved with addition of a full-color cover. The 1996 edition continues this trend with its most attractive cover ever, specially identifying African-American, Mexican-American, Asian and native-American festivals.

Measurement

300,000 calendars are disseminated each year through visitor requests and consumer and trade shows. It is among the most requested and depended upon items produced each year by the Division of Tourism.

Budget

CalTour: \$90,000

Regional Brochures

Objective

- Provide regions with handouts which can be used to promote their area at consumer and trade travel shows.

Description

Supply of these brochures is nearly depleted. As CalTour lacks budget to reprint, current supply will be used until gone.

Budget

CalTour: \$0

Travel Posters

Objective

- Provide travel agents and tour operators with generic California posters for placement in retail travel agency window displays.

Description

A four-color poster generally depicting California.

Budget

CalTour: \$5, 116

California Adventures & More

Objectives

- Encourage visitors to experience hard-to-find adventure-oriented activities primarily found in California's rural communities.
- Educate the consumer about the exciting activities the "California Countryside" has to offer.

Description

Tour operators and the travel media have asked for a guide that will help them develop tours that include California outdoor adventures, such as: fishing, boating, rock climbing, hiking, camping, horseback riding, racing, ocean kayaking, water skiing, sail planing, hot air ballooning, etc. Because of the small distribution list, ever-changing nature and extensive research necessary for such a guide, it is not economically feasible to have this publication supported with advertising. Because of the extensive amount of research necessary, an intern has been assigned to update the guide. It is maintained on computer and updated annually. Current supply will be used until depleted. Budget does not exist to reprint, so the information in this publication will be placed on the internet.

Budget

CalTour: \$0

IT Network

Objectives

- Provide increased access to visitor information through telephone books

Description

The IT Network and Pacific Bell visitor guide located at the front of select phone books in the San Francisco, San Diego and Sacramento was very successful. CalTour will continue to serve as liaison to the project assuring accuracy and balanced representation of California destinations. CalTour's 800 line will be listed at no cost in return for assistance given to the phone company.

Measurement

IT Network and Pacific Bell will provide CalTour with call volumes.

Budget

CalTour: \$0

California Welcome Centers

Objective

- Provide California travel information to consumers at major visitor information centers throughout the state.

Description

California Welcome Centers now exist at Kingsburg and Rohnert Park. Others have been approved at PIER 39, Collier and Anderson with additional applications under consideration. California Welcome Centers are like franchises in that the state pays nothing to the individual centers. Centers pay the state for the privilege of being designated as California Welcome Centers. The Legislature intended that the program be self-sustaining. At present, there are not enough centers to have the program fully pay for itself, and it we would lose those we have if we charged them a proportionate share of the administrative costs related to operation of the entire Welcome Center program, so annual fees are set at \$5,000 per center with those funds used to

pay for administrative costs (inspections, travel expenses to the centers) and to ship available state visitor materials to the centers. It is each Center's responsibility to install displays and provide visitor information.

Budget

CalTour: \$0

Internet

Objective

- Provide California travel information to consumers, the travel trade, travel media and the travel industry at low cost via the Internet.

Description

CalTour established an Internet home page as a sub-page of the State and TCA home pages. However, the current page contains only partial information about the full breadth of travel opportunities available within California. Therefore, CalTour plans to contract with an internet page designer to improve the looks of the CalTour home page, add CalTour information and include additional links to other existing California tourism internet addresses.

Budget

CalTour: \$15,000

Electronic Kiosks

Objective

- Provide California travel information and reservation/ticket purchase services to consumers at remote locations throughout California.

Description

CalTour has contracted with Travel Communications Corporation to install visitor information kiosks throughout California. Five kiosks will be installed in the beta test phase during this fiscal year, with 164 installed by the end of this decade. The kiosks will provide visitor information for locations throughout the state, with capability for transactions that potentially could produce revenue to fund statewide tourism marketing efforts.

Budget

CalTour: \$0

Fulfillment

Objectives

- Provide 24-hour, touch-tone assisted, toll-free, telephone response to visitor inquiries for travel information
- Furnish fax-on-demand response to visitor inquiries
- Provide callers with a variety of delivery methods at the lowest cost possible to CalTour and the caller.
- Ship 225,000 visitor information packets

Description

A fulfillment company, Accelerated Information, located in San Francisco has been contracted to manage CalTour's fulfillment program including answering calls to CalTour's toll free telephone line and packing and sending materials to consumers and the travel trade.

The basic packet includes: one California Visitor Guide, one map and one Special Events Calendar. A State Parks guide and the Ski California guide are available seasonally.

Measurement

A pre-post conversion study will be conducted to monitor the effectiveness and return-on-investment of the Collateral and Fulfillment program.

Budget

CalTour:	\$1,082,339
Postage:	\$535,000
Fulfillment contractor:	\$495,000
Reserve	\$50,000
Trucking	\$2,339

IN-STATE MARKETING

In-state Overview

As stated in the Marketing Strategy, CalTour also promotes travel to lesser-known or underutilized destinations. The CTC has defined them as being the eight rural regions of California: North Coast, Shasta Cascade, High Sierra, Gold Country, Central Valley, Central Coast, Inland Empire and Deserts and California's urban ethnic communities.

Advising the CTC on how to best direct the marketing effort toward these lesser-known destinations are two committees: the California Countryside Committee, which is comprised of eight voting members (one from each rural region) who have been elected by destination marketing organizations within their regions (chambers of commerce and convention and visitor bureaus) to represent the entire region, and the California Multicultural Tourism Committee. Both committees advise the CTC and CalTour as to what projects will best promote travel into lesser-known and under-utilized destinations. The committees meet four times per year. Eight members from each committee meet twice with the full marketing advisory committee.

Additionally, a natural resources interagency committee, comprised of representatives from CalTour, the California Countryside Committee, California Arts Council, California Film Commission, California State Parks, U.S.D.A. Forest Service, National Parks Service, California Fish and Game, U.S. Fish and Wildlife Service, Bureau of Land Management, California Coastal Commission, California Coastal Conservancy and CALTRANS meet annually at the invitation of CalTour, to discuss means of improving tourism opportunities on public lands.

Some of the best opportunities for tourism to rural communities comes from international tourism. German travelers, for example, take three weeks vacation dutifully every year and they enjoy exploring the countryside by private vehicle. Further, 67% of German visitors in California travel to national parks. Therefore, it is extremely expensive for rural communities to develop international tourism. That is why the support given by CalTour is so essential for rural destinations.

Research has also illustrated the value of educating California residents that there is an entire world of vacation opportunities available right in "their own backyard." Approximately 80% of the \$56 billion generated from tourism in California results from in-state travel by California residents. Competing destinations outside California - both domestic and international - target California residents, because our populace spends millions traveling each year. Therefore, it is useful, particularly for communities that lack the resources to market on their own that part of the State's marketing plan be used in ways that keep Californians traveling within the state. More than half of the trips taken by Californians are extended day trips, mini-vacations or longer excursions throughout the state. It is this population base that keeps California as the number one travel destination in the U.S.

CalTour's role with respect to marketing within the state has been to encourage and help lesser-known and under-utilized destinations within the state to work together in educating Californians about the many undiscovered destinations to be found within California. CalTour serves as a "catalyst" in bringing together competing micro-destinations to work together within marketing groups. Seed funding is used to generate further investment by members of these groups and to conduct marketing that would not otherwise occur.

That is the essence of the regional marketing approach that was begun in 1984 under the banner, "Discover The Californias." Regional marketing helps travelers discover a variety of choice. However, it can also be confusing, as travelers tend to pick destinations on the basis of their own interests. However, the theme line "Discover The Californias" has proven to be confusing to people, particularly to those who live outside, so it is no longer used.

In light of the current economic situation, coupled with recent tragic events, the State will employ a variety of programs to effectively "sell" Californians on taking additional in-state trips. The in-state marketing effort for next fiscal year will be directed primarily into targeted promotional opportunities designed to accommodate cooperative partners and expand upon successful non-advertising programs initiated in prior years.

In-state Target Audiences

Audiences vary by program. However, principal audiences include:

- Couples, aged 25-plus with household incomes exceeding \$35,000
- Parents aged 25-54 with household incomes exceeding \$35,000
- Tour operators
- Travel agents
- Travel consumer and trade media
- Ski vacationers from select markets

In-state Timing

Year-round: • Countryside Grants
 • Media Relations

Winter/Spring • Ski California

In-state Strategies

- Create and distribute specific information and incentives on the regions of California and their special events.
- Assist the California ski industry in maintaining its highly successful promotions to keep California skiers on California slopes and develop new markets.
- Generate positive, travel-related publicity for the "California Countryside" throughout the year.
- Develop programs benefiting California's ethnic communities and minority markets.
- Incorporate the use of the California arts as a lure to visit the "California Countryside. "

In-state Tactics

Region-specific Grants

Objective

When the State established tourism regions, it provided increased opportunities for tourism entities within the new regions to promote collectively, but it also placed increased costs upon the tourism marketing organizations within these regions for region-wide promotional activities. To offset these costs, CalTour has provided grants to the regional promotional organizations for region-directed marketing activities. This softens the burden of region-wide marketing. It also

serves to bring together competing destinations within a region. Because no one wants to lose the grant funds for their region, they must work together in order to utilize the grants.

- Encourage competing destinations within the state's eight rural regions to work together
- Assist destinations within rural regions in stimulating increased tourism.

Description

CalTour provides grants of \$15,000 per region to the eight countryside regions, \$5,000 of which must be spent exclusively in participating in CalTour-sponsored sales missions. These funds can be used for region-wide promotion only. Each elected regional representative must present a marketing plan for use of the funds and guidelines regarding how the funds may be expended must be followed. Regional representatives are allowed to develop plans that effectively market their region, in that each region has different objectives and audiences. Generally, the regional marketing programs include: brochure development, consumer and trade shows, publicity development, and advertising.

Measurement

In the past, the marketing plans provided by each region were assessed as to their effectiveness by CalTour. In the future, regional representatives will be required to submit a report no later than the end of each calendar year in order to be eligible for funds in the following fiscal year. These reports will articulate how the funds were expended, include samples of produced work and include measurement of contacts made, brochures distributed, business booked, etc.

Budget

CalTour: \$120,000

Multicultural Travelogue

Objective

- To inform travelers of the variety of positive tourism experiences to be discovered in California's ethnic communities and stimulate visitation to these communities.

Description

A video documentary will be produced that communicates that California's multiethnic society is another great reason to visit California. The video will be provided to public television stations throughout California. Sponsors will be sought for placement of the travelogue on cable networks or in syndication.

Measurement

Subjective measurement of the quality of the resulting video. Acceptance of the video by public television stations. Sponsorship of the video on targeted media. Viewer response. Increases in visitation to depicted destinations. This is a two-year project to be completed in spring of 1996.

Budget

CalTour: \$15,000

Private Sector Contribution: In-kind support

Ski California

Objectives

- To attract international and domestic skiers to California's ski resorts

- To encourage Californians to ski at California ski areas

Description

Two years ago, hardly any Britons skied in California. CalTour proposed combining California skiing with California's other great vacation destinations to the California Ski Industries Association and has since made California a major destination for British skiers. In the first year, 3,500 Britons skied in California. Last year, 8,000 Britons purchased the Ski California package and this winter, we anticipate that 11,000 British skiers will travel to California, all resulting from the CalTour/CSIA coop program. This program has grown from a modest \$60,000 brochure into a \$675,000, multi-faceted, cooperative marketing program that is generating in about \$15,000,000 in new travel to California and is considered within the U.S. ski industry as one of the most effective.

Conducted in partnership with the California Ski Industry Association and other private sector partners, such as Virgin Atlantic Holidays, United Airlines, Times Mirror Publications, Coca-Cola, etc., this year's campaign will extend the reach of past promotional efforts into new domestic and international markets.

The campaign, restarts in November with promotions directed to the domestic markets of Chicago, Dallas, Los Angeles, San Francisco, New York, New Jersey and Florida. International target markets include the United Kingdom, Australia, New Zealand, Mexico and South America. Promotional efforts planned include cooperative advertising, participation in specific ski industry trade shows and sales missions, organization of familiarization tours, foreign language brochures and various implementation and publicity-related activities.

In addition, the program will involve the production and distribution of 400,000 Ski California magazines to consumers in select markets and production of Ski California brochures in several languages.

Measurement

Program effectiveness will be assessed according to each individual activity. Trade shows and sales missions will monitor leads generated and quality of participation by the travel trade or consumer at specific events. Advertising campaigns will be monitored by tracking the inquiry rates to individual resorts and tracking of specific package sales. Publicity efforts will be monitored by resulting story coverage. Long-term results will be established by studying overall market share figures. Direct participation by travelers on ski packages related to the program will be measured.

Budget

CalTour:	\$175,000
CSIA and private partners:	\$500,000

Consumer Shows

Objective

- To promote California Countryside destinations to Californians attending major consumer shows in Orange County, Los Angeles, and Seattle.

Description

CalTour will purchase exhibit space at three major consumer travel shows and staff the booth at these shows. Rural regions will be allowed to exhibit inside the California booth.

Measurement

Brochure distribution at the shows. Consumer attendance of the shows. Evaluation by participating regional representatives.

Budget

CalTour: \$3,000

Private Sector Contribution: In-kind support

Editorial Visits

Objective

- To meet with travel writers and editors located inside California for the purpose of helping them develop travel itineraries, answering their questions, informing them of new or unknown travel opportunities and thus stimulating increased editorial coverage of California destinations.

Measurement

Press clippings will be collected and values of each article, based on ad equivalency, will be assessed.

Budget

CalTour: \$0

Private Sector Contribution: In-kind support

Photography

Objective

To maintain a comprehensive slide library in order to gain maximum exposure for California such as encouraging new story ideas or CalTour-sponsored publications.

Description

Essential to getting positive exposure in media is having at hand an excellent collection of original and high quality duplicate color images of California. The Division will continue an annual effort to document the colorful diversity of California through photography while working in close cooperation with local areas. High quality duplications of existing color slides will be made as needed.

Budget

CalTour: \$15,000

News Clipping Service and Analysis

Objective

To gauge the level of editorial coverage, both negative and positive, and to measure the amount of coverage generated through CalTour media relations efforts.

Description

The services of Bacon's Clipping Bureau have been retained to clip daily and weekly newspapers with circulation of 5,000 or more, and consumer, business and travel trade magazine coverage mentioning CalTour or featuring California as a vacation destination. The news clips will also be analyzed in terms of media value.

Budget

CalTour: \$12,000

DOMESTIC MARKETING

Domestic Overview

1994 was a super year for California tourism in no small measure due to the success of CalTour's domestic marketing program. Of note, CalTour's national consumer advertising campaign stimulated a turnaround in travel to California and is forecast to carry strong visitation numbers into 1995. Research conducted by San Francisco State University documents high effectiveness by this program.

Unfortunately, in FY 1995/96, CalTour, due to budget restrictions caused by inflationary costs and costs related to implementing the California Tourism Marketing Act, must cut its domestic marketing program sizably. This will cause domestic advertising to change significantly. However, every effort is being made to maximize the effectiveness of the domestic marketing program even though it is taking large cuts.

Consumer advertising continues the theme established two years ago that California has whatever vacation experience you are seeking. Television commercials will demonstrate the four vacation typologies sought by California vacationers: family vacations, romantic getaways, nature outings and recreation-based trips.

Families choosing between California and Florida will be given price advantages to selecting the Golden State when they purchase California Fun Spots packages that include free admission to the state's top eight attractions. This durable promotion has been kept in CalTour's domestic program with changes each year that keep it fresh and useful in attracting visitation to California.

CalTour is reducing the number of domestic trade shows it will attend, not so much because of budget cuts, but because of lessons learned at past shows. The American Airlines Fly Away Show and Southwest show just didn't perform to our expectations. So, they will be replaced, in an effort to effectively communicate with travel agents, with the ASTA World Travel Show. The highly successful National Tour Association program will be retained.

Publicity generation remains important and will be sustained at previous levels, due to its cost efficiencies. Of significance, the annual New York media blitz originated by CalTour three years ago has become a staple of our program due to wide state industry support, great turnout by the media and improved media coverage.

As in the past, the timing of this program is designed to support summer business. The CTC directed CalTour to investigate possibilities for beginning promotion of off-season sun destination travel, but found that its budget was too small to be effective in expanding communications at this time.

Domestic Target Audiences

- Adults who took a trip of 100 miles or more away from home during the past 12 months
- Parents, 35 plus years of age (skewed female) with household incomes in excess of \$50,000 per year.
- New visitors
- Repeat visitors

Domestic Timing

- Year-round:
 - Fun Spots marketing
 - Press trips/tours
 - Publications
 - Travel trade shows
- Winter/Spring
 - Target market television
 - Target market radio
 - Target market supplements
 - Pre-post research
 - Target NTA tour operators

Domestic Strategies

- Heighten positive top-of-mind awareness of California's diversity and increase the desire to visit California as a tourism destination throughout the U.S.
- Generate in excess of \$3 million in private sector support to assist the State in communicating California's unique offerings and attractions.
- Educate and motivate the travel trade with special promotions, familiarization trips, and sales calls promoting California in targeted markets.
- Generate 300,000 telephone and reader service inquiries from prospective vacationers and, as a result, stimulate potential visitors to travel to California via widespread distribution of the consumer fulfillment guide.
- Support the domestic advertising effort with a strong, positive publicity campaign on California and its 12 regions.
- Create broad-based promotions which complement the goals and objectives of the overall domestic marketing campaign and motivate private sector participation.

Domestic Tactics

Consumer Advertising

Objective

- Motivate first-time and repeat domestic visitors to consider California for their vacation;
- Provide a presence for California in major national magazines and on network and spot TV during the critical travel planning season;
- Complement the target marketing program with an advertising program;
- Generate interest and inquiries for vacation planning information from the Division of Tourism;
- Stop the decline of market share experienced in major western out-of-state leisure travel market; and
- Boost travel trade inquiries.

Description

A separate Advertising plan is available which provides detailed analysis of this element.

Television commercials are the backbone of this advertising plan. The broadcast campaign includes both national buys and a highly targeted spot markets. Backing up the TV buys will be 1/3-page black and white print ads, intended to provide additional exposure for the toll free telephone number.

The call to action is for viewers and readers to call CalTour's 1-800-GO-CALIF number seen in all print and broadcast ads. Prospective visitors will also have the option of receiving California Tip Sheets by fax within five minutes.

Measurement

Measurements utilized to judge campaign effectiveness will include pre-post campaign awareness studies, inquiry rates, reach and frequency goals and overall increases in domestic market share on a long term basis.

Budget

CalTour: \$2,270,000

Marketing Consultant

Objectives

- Assist CalTour with conceptualization, development and execution of marketing programs
- Execute major consumer promotions
- Conduct cooperative marketing campaigns
- Innovate marketing into new media, such as internet, kiosks, and film production
- Coordinate international sales missions (budgeted elsewhere)

Description

Jim Garber and Associates has been retained to augment CalTour's ability to develop and execute domestic and international marketing activities.

Measurement

The contractor is evaluated on a per project basis. Criteria will include: amount of positive publicity generated for California, quality of creative projects undertaken, amount of successful cooperative programs introduced and other performance-related measures will be exercised.

Budget

CalTour: \$80,000

California Fun Spots Co-op Promotion

Objective

- Provide the State with a major national promotional campaign primarily reaching distant domestic and Western Canadian markets.
- Organize and unify the theme parks industry into a cooperative marketing unit working together to achieve mutual goals and objectives.
- Promote, via attractions and special offers, California as a vacation destination.
- Utilize the value of the participating attractions, as a cohesive group, to attract cooperative advertising support from an airline by conducting trade shows in key market cities.
- Showcase California's unique collection of theme parks which cannot be found in other states or international destinations.

Description

The Fun Spots group is a cooperative marketing team comprised of eight of California's most popular attractions as well as the Division of Tourism. The attractions are: Disneyland, Universal Studios Hollywood, Sea World of California, Knotts' Berry Farm, The San Diego Zoo, The San Diego Wild Animal Park, The Monterey Bay Aquarium and Marine World Africa USA. Two major new programs will be presented by the Fun Spots group in 1996. The first is the introduction of the new "California Fun Spots Card." Distributed via the State's annual fulfillment publication, as well as the Sunday supplement, "Parade Magazine," close the four million of these cards will be delivered to potential travelers to California in 11 western states. The "California Fun Spots Card" provides special discounts and value added features to each of the attractions as well as participating Marriott Hotels in California. The Card is presented on a specially designed two page advertisement, promoting California as a vacation destination and each of the individual Fun Spots attractions. The second effort for the year involves a special target marketing campaign in Western Canada. The Fun Spots will create a unique "California land" promoting travel to the State during all ten days of The Calgary Stampede, July 5-14, 1995. More than 1.25 million people visit the Stampede during this time, and each will be bombarded with California live shows, collateral materials and special travel offers. In addition, Fun Spots media appearances will be scheduled on all major television and radio stations in Calgary and a Fun Spots travel agent event will take place right at the Stampede on Friday, July 12. To complete the program, a major consumer promotion with either Coca-Cola or Kodak will be presented in Western Canada as part of the Stampede effort, with trip giveaways to the California Fun Spots being offered.

Measurement

The "California Fun Spots Card" program will be measured by the usage amount at each of the attractions as well as at Marriott Hotels. The Calgary Stampede program will be measured by free media obtained, by offer distributed at the Stampede which are redeemed at the attractions, by entries in the special consumer promotion, and the amount of free promotional exposure received as a result of the consumer promotion.

Budget

CalTour:	\$140,000
Attractions:	\$225,000
Marriott:	\$20,000
Stampede:	\$100,000

IMAX

Objectives

- Develop a major film about California that will be shown throughout the world
- Develop a product that can be used as a platform for enticing travel trade educational programs

Description

IMAX is the world's largest motion picture format. Using 70 mm film, Imax contains an image ten times bigger than traditional 35mm motion pictures and is seen on gargantuan screens at special theaters throughout the world. These theaters are often located in museums, amusement parks and scientific facilities. New films are a means of attracting return visitation to the theaters and are welcomed by the theaters. CalTour intends to seed funds that will develop the film

concept in order to attract private funding that will produce the film. The film is intended to focus upon California in an educational yet entertaining and alluring manner. The film will also be utilized as the centerpiece for major California promotional efforts in the international marketplace.

Measurement

In the first year, measurement will be made on the success of the story board treatment development in attracting investor interest. Since the film will not be finished until the year 2,000, actual measurement of viewership will not be available for several more years.

Budget

CalTour: \$70,000

Familiarization Tours

Objectives

- Educate tour operators concerning tour itineraries available in all of California.
- Increase mid-week and off-season visitation.

Description

Familiarization tours will be created by the State to showcase to tour operators the value of developing itineraries which encompass the rural regions of the State.

Measurement

This program will be evaluated by tour operator participation; private sector assistance with in-kind contributions in support of the fams; and eventually the amount of tour operator itineraries developed as a result of the fams.

Budget

CalTour: \$5,000

Private Sector Contribution: In-kind support

National Tour Association Annual Convention and Trade Show

Objective

- Educate tour operators about California destinations and potential tours.
- Assist tour operators with planning tours of California.
- Stimulate development of tour packages that include California.

Description:

CalTour brings together California tourism businesses and destinations in several efforts aimed at improving tour operator knowledge of, access to and interest in California as a destination for organized group tours.

A California directory of NTA members is published and distributed to tour operators to assist these operators in contacting California representatives.

NTA tour operators are told that California offers personalized fam tours year-round, to help them learn about new places to take their group tours.

A reception, sponsored by California businesses and destinations, is coordinated by CalTour at NTA's Spring Tour & Travel Exchange and at the NTA Leadership Luncheon.

Team California hosts the tour operator retreat finale dinner. This event allows California maximum exposure amongst an exclusive group of operators

CalTour also coordinates a contest sponsored by visitor bureaus, hoteliers, car rental agencies, airlines and attractions for California vacation giveaways awarded at the NTA annual convention. In addition, special educational and promotional materials that enhance the State's appeal are made available to NTA members at the annual conference.

Measurement:

California's leadership of this committee has resulted in increased exposure for the State among tour operators. An extremely high number of entries was received for the vacation giveaway program at NTA, with 209 tour operators participating, a 41 percent penetration of a key audience.

Budget

CalTour: \$20,000
Private Sector Contribution: \$29,750

ASTA World Travel Show

Objectives

- Educate travel agents about selling California

Description

CalTour will exhibit at the American Society of Travel Agents World Travel Show for the purpose of educating attending travel agents about selling California.

Measurement

Travel Agent attendance at the show, numbers of brochures and materials distributed, subjective evaluation of response.

Budget

CalTour: \$1,500

California Conference on Tourism

Objectives

- Inform California travel industry about CalTour programs so that they can take advantage of them

Description

Each year, CalTour presents research findings and educates the travel industry about its programs at the California Conference on Tourism. This is the most attended tourism educational conference in the State.

Measurement

Participation at the conference. Subjective measurement of response to presentation

Budget

CalTour: \$4,000

Media Relations

Objectives

- Provide ongoing communication and place California story ideas with key press, contacting at least 20 writers per month.
- Meet with key travel editors and writers and broadcast media with the goal of generating positive publicity on California during vacation planning periods.

Description

A major part of an effective media relations program is ongoing contact with the media. Editorial visits will be made to print and broadcast media in New York and Chicago.

Measurement

The program is evaluated by media contact reports and subsequent news clippings. The value of the publicity received takes into account the station or publication advertising rates and the size, length and tone of story.

Budget

CalTour: \$0

Publicity value: \$1,000,000

News and Feature Releases

Objectives

- Distribute to 700 travel consumer and trade reporters and editors quarterly "What's New" releases from which they can develop stories or excerpt for their publications.
- Provide 700 travel consumer and trade reporters and editors with feature and/or news releases from which they can develop stories or print as is.

Measurement

Press clippings will be collected and values of each article, based on ad equivalency, will be assessed.

Budget

CalTour: \$15,000

Publicity Value: \$100,000

NY/Washington, D.C. Media Blitz

Objective

- To reach a substantial number of the nation's key travel trade and consumer (print and broadcast) journalists, magazine editors, and travel book editors for purposes of generating positive publicity about California.

Description

- The California Division of Tourism will lead a delegation of approximately 25 representatives of California destinations, attractions, and resorts on a media blitz to New York City and Washington, D.C., February 26 - March 1, 1996. The concept will consist of a major California reception in both cities, plus a marketplace where delegates can meet one-on-one with the press in attendance. New York City is home to most of the major national magazines, travel guides and television networks, some of the most notable daily newspapers in the U.S., plus numerous top-producing freelance travel writers. Washington, D.C. continues to be an important market for California, especially when targeting association business. The media blitz is a cost effective way to access the top consumer and travel trade media outlets and to promote positive coverage for California's diverse destinations, attractions, activities, and events. A similar media blitz in January 1995 consisted of 29 delegates and attracted 140 media in New York City, and 28 in Chicago. The media blitz will be coordinated by a public relations sub-contractor selected by CalTour.

Measurement

Program success will be measured by overall turnout at the events, the number of California participants, comments on evaluations from participants, the amount of California stories generated as a result of the media blitz, and overall editorial content of stories published or aired by press in attendance.

Budget

CalTour:	\$50,000
Private sector contribution	\$ 3,000 per delegate

"What's New in California" Releases

Objective

- Place informational updates in travel roundup and event listings in major media outlets.

Description

Updated quarterly, the release is a vehicle for informing the consumer and travel trade media of new developments, attractions and other timely events happening throughout California.

Measurement

Clippings generated and level of interest by consumer and travel trade media will be utilized to judge success.

Budget

CalTour:	\$10,000
Publicity value:	\$50,000

INSIGHTS

Objective

- Inform California's travel industry about CalTour's marketing activities so that they will be able to take advantage of them.

Description

This newsletter is published on a quarterly basis and is designed to be the primary communication piece of the Division of Tourism to the state's travel industry and interested public officials. Information contained in the publication includes ongoing activities of CalTour, new travel research data, tourism briefs, plus director and guest columns covering topics of interest to California's travel industry.

Budget

CalTour: \$38,000

Society of American Travel Writers

Objective

- Sustain relations with key North American travel writers, broadcasters and editors for the purpose of stimulating interest in story concepts.

Description

The development and nurturing of relationships with the travel media is essential to gaining positive editorial coverage for California. As a member of the prestigious and exclusive Society of American Travel Writers (SATW), the director and media relations manager have the advantage of developing relations with these contacts that otherwise would not be available to them. Attendance at national and western chapter meetings provides a forum for conversation and story development. Membership in SATW by both the Director and Media Relations Manager gives California a distinct advantage in developing editorial coverage that other state tourism offices do not have.

Measurement

Contacts made, editorial coverage received.

Budget

CalTour: \$3,000

Media Relations Assistant

Objective

- To assist the media relations manager in responding to numerous press requests, generate press releases, write newsletter articles, and work on special thoughts.

Description

CalTour will hire a graduate student assistant through California State University Services.

Budget

CalTour: \$19,000

INTERNATIONAL MARKETING

International Overview

Think of California tourism as a pie. A larger piece of pie can be served only by making someone else's share smaller or by baking a larger pie. International tourism is the larger pie. Along with domestic tourism, international tourism allows California to bring new customers into the state and thereby increase sales opportunities for California companies, without having them take business from another California business.

The greatest tourism markets of the future will not be found within the United States, they will be found outside this country. California is ideally positioned to benefit from the spectacular growth in international tourism due to its allure and its geographic location.

Today, tourism is already California's third largest export, larger than agriculture, food processing and chemicals combined and trailing only the export of computers and related technology. Tourism is larger than the export of aerospace and transportation equipment, and it is critical to California's future that we maintain that position. California's economy has successfully shifted from the industries of the past century (defense, heavy manufacturing and agriculture) to the industries of the 21st century (tourism, technology, information and entertainment).

Tourism is particularly influenced by the industries of the next century in that they stimulate human interest in personally visiting the places they have intellectually visited. That is, someone who sees California in motion pictures wants to go there. Likewise, people who are connected to California products and ideas through their use of technology, want to visit this place. There is a phenomenally large market of travelers beyond our shores who can be motivated to travel and vacation here. All we need do is put the thought in their minds and knowledge in the hands of travel agents and tour operators to help them get here. The international marketing program helps do that.

A very positive sign occurred in 1984. California's share of international tourism grew to 27.2% of all foreign travel in the U.S. There is no precise way of measuring the exact causes of the recovery, though these factors are considered to have contributed most to the change:

1. California (both CalTour and the state's travel industry) has for the past three years conducted consistent and very effective international marketing efforts.
2. Attacks on tourists in Florida caused European travelers to lose confidence in visiting that state and to shift visits to other U.S. destinations, principally California.
3. Economic factors influencing German and Canadian travel have caused California to gain position on Florida due to its lesser reliance on travelers from those countries. Counterbalancing this to a degree has been the effect of Peso devaluation on Mexican travel to California and the southwest. Also, strong Yen to dollar relationships have encouraged increased travel to California by Japanese citizens.

Both California and Florida experienced a strong beginning to 1995, so it will indeed be interesting to compare results in spring of 1996 and determine if California continues to hold share, move ahead or fall back.

International Target Audiences

Canada:	Air travelers from western provinces Drive market from British Columbia and Alberta Snowbirds Purchasers of motor coach and fly-drive packages
Western Europe:	Middle and upper-income fly-drive travelers Users of all-inclusive package tours
Pacific Rim:	First-time purchasers of standard packages Special interest travelers/honeymooners/students
South America:	Middle and upper-income Brazilian and Argentine travelers First-time purchasers of standard packages

International Timing

Fall 1994:

Canada Sales Mission, Vancouver, Edmonton, Calgary
World Travel Market, London
Pow Wow Europe, Paris
Japan Association of Travel Agents, Tokyo
La Cumbre (South America)
U.S. Travel Fair (Korea)
California Dream Days (November-February), Canada

Winter 1994:

California Dream Days (through February), Canada
Expo Vacaciones, Mexico City
FITUR, Madrid
Mexican Sales Mission, Mexico City, Guadalajara
ITB, Berlin (International Tourism Exchange)
Fam Tour - UK
South America Sales Mission, Buenos Aires, Sao Paulo

Spring 1995:

TIA Discover America Pow Wow, Los Angeles
Fam Tour, Germany
Australia/New Zealand Destination Seminars
US/Japan 2000 Hard News Press Trip, San Francisco, San Jose
European Sales Mission, Amsterdam, Paris, Milan
European Incentive Business Travel Market, Switzerland

International Strategies

- Maintain high visibility consumer and trade programs in Canada as developed in previous years.
- Maintain public relations and promotional programs in Europe and Japan, whenever possible.
- Continue trade mission schedules, at present, with the flexibility to add or delete based upon future world events.
- Maintain trade relationships and private-sector partnerships.

- Keep the international programs and budget flexible so that the State has the ability to react with optimum effectiveness to major world events which could impact international, domestic and local travel patterns.
- Reach the consumer, whenever possible, through the leveraged special promotions.
- Maintain as best as possible international travel-related expenditures and employment generated by the foreign visitor.
- Increase the State's market share of international visitors to the U.S. from its key foreign markets (Canada, Western Europe and Japan) and secondary markets (Australia/New Zealand, Korea, Mexico and South America).
- Increase the level of knowledge about California's cities and lesser-known destinations among international wholesalers, tour operators and retail travel agents.

International Tactics

California Dream Days Co-op Promotion

Objectives

- Generate off-season visitation from Canada.
- Encourage Canadians to travel to and through as much of California as possible.
- Leverage State financial resources with Canadian cooperative partners to generate extensive advertising and promotional support in selling California as a destination.

Description

California Dream Days is a four-month promotional campaign presented in cooperation with Air Canada and Canadian Airlines International, aimed primarily at Western Canada consumers who reside in British Columbia and Alberta and at consumers living in Eastern Canada. Discounts offered by California suppliers of 20% or more are given exclusively to Canadians within this promotion if they visit California from November through February.

Measurement

The primary means of measuring this promotion is the growth of airline tickets sold between Canada and California by the participating airlines during the promotional period. Also measured are the discounts given to Canadians by California companies, though few California companies report results back to us. Success also can be measured by the enthusiasm that California companies have in participating in the promotion as well as by: their joining CalTour on the affiliated sales mission and their and the airlines' financial contribution to the ad campaign.

Budget

CalTour:	\$80,000
Private sector commitment:	\$1.5 million

Western Dream Days Co-op Promotion

Objectives

- Stimulate increased Western Canadian participation in California Dream Days

Description

CalTour will...

Measurement

Budget

CalTour: \$10,000

U.S./JAPAN 2000 Co-op Promotion

Objective

- Double the amount of tourism between the United States and Japan by the year 2000.

Description

In an effort to further balance trade between the United States and Japan, the Japanese government has proposed a bilateral effort to double tourism between the U.S. and Japan. USTTA and the Japan National Tourist Organization (JNTO) are working cooperatively in several areas to stimulate additional tourism both ways across the Pacific. Principal marketing tools employed in this program include:

- Visit USA Catalog of all existing tours available in the United States
- Catalog of Optional Tours available to Japanese FIT travelers upon arrival in the U.S.
- Six press trips per year for three years involving hard news journalists to demonstrate traveler safety and security stories throughout the U.S.

CalTour has invested time and money in the execution of these cooperative programs. The Director of Tourism is serving as coordinator of western press trips and liaison to eastern press trips. \$100,000 in funds, over two program years, have been dedicated to production of the catalogs, with California receiving proportionate space to its investment.

Measurement:

Subjective analysis of press coverage and increased purchase of California pre-packaged and optional tours by Japanese travelers.

Budget

CalTour: \$50,000

LA C&VB \$100,000

San Diego C&VB \$25,000

Press Trip Participants: In-kind

Sales Missions and Trade Shows

Objective

- Educate and sell California as a vacation destination to travel agents, tour operators and travel wholesalers worldwide.
- Provide an umbrella representation for the private sector to participate with the State in jointly presenting California to the travel trade.
- Showcase to the travel trade the diversity of vacation/opportunities available in California and to develop more rural region visitations by international travelers.

Description

A series of trade missions/exhibitions, led by the State for the private sector, will take place in Canada, Western Europe, the Pacific Rim, Mexico and South America during the year. These trips give California the opportunity to meet face-to-face with the travel trade to educate them on packages, tours and itineraries available to their clients.

CalTour will participate in the following international trade shows and sales missions based upon the input of the Division's travel trade tourism advisory committee:

USTTA Australia/New Zealand Seminars

In partnership with USTTA, CalTour and several California suppliers participated in a series of seminars designed to educate the Australian/New Zealand travel trade about the USA travel product. Though California continues to be a preferred long-haul destination, the experienced travelers are heading to other eastern states. The seminars offer an excellent opportunity to help recapture the Australian/New Zealander's attention.

POW WOW Europe - Paris

A key opportunity to meet with the smaller, lesser known European wholesale tour operators who are unable to attend the TIA Discover America International Pow Wow. Coordinated by the Travel Industry Association of America in conjunction with USTTA.

La Cumbre

A premiere opportunity to meet with South American tour wholesalers and retail buyers. Though in an infant stage, the Brazilian and Argentine travel markets are experiencing substantial growth. Representing travelers to California in 1993, both countries are experiencing stable and profitable economies, providing residents the financial capability to travel to long haul destinations such as California.

Canada Sales Mission

Solely a California effort consisting of approximately 25 California suppliers. Canada represents 800,000 plus visitors a year to California. Features the top producing markets for the Golden State.

World Travel Market

Considered the largest English-speaking travel exhibition in the world, World Travel Market represents the premiere opportunity to meet with important wholesale tour operators from the United Kingdom. The United Kingdom sends more than 650,000 visitors annually to California, making it the second largest generator of overseas visitors (preceded by Japan). More than 25 California suppliers annually participate in the State's booth section in an effort to attract the attention and conduct business with some of the largest wholesale tour operators and retail agencies in Europe.

JATA

Every other year, the Japan Association of Travel Agents conducts a convention and trade show. In December, 1995 it will be held outside Tokyo for the first time in its history. CalTour sets up a central booth design for California companies. This year's theme will be California sports.

VISIT USA Travel Fair, Korea

California presence and offer and brochure distribution option to participate with CalTour at the Visit USA Travel Fair in Korea this year.

Expo Vacaciones

This show, the only concentrated travel trade effort in Mexico conducted by the State, provides an excellent opportunity to meet with the travel trade. Mexico represents California's largest visitor market, sending 2.6 million visitors a year, and is receiving increased recognition as an affluent market.

Mexico Sales Mission

California-theme receptions, travel agent seminars and mini California trade shows are set up in Mexico City and Guadalajara during this sales mission. The Mexico Sales Mission is the largest attended trade show conducted by CalTour.

International Tourism Exchange, Berlin

The premiere opportunity to meet with German-based wholesale and retail buyers, media, and for the first time - consumers. Germany is California's largest generator of visitors from continental Europe, and the State's third largest generator of overseas visitors (600,000 plus annually). The USA Pavilion is coordinated by USTTA Frankfurt, and the exhibition is recognized as the largest exhibition in the world.

European Sales Mission

CalTour organizes the first mission in several years to secondary markets of The Netherlands, France and Italy in this year's European sales mission. VIP tour operator functions will be held in Paris and Milan. Marking its first state-organized presence in Amsterdam, California will also host a VIP tour operator function in this city and exhibit at the Visit USA show to reach the Dutch retail trade.

South America Sales Mission

This show includes a California section at Destino USA and Visit USA Travel Expo in Brazil and Argentina. Approximately 15 California suppliers representing major attractions and primary destinations will meet with travel trade and media representatives. Both countries recently entered into the top ten generators of USA arrivals among all markets, and its citizens produce one of the highest per capita trip expenditures in California.

FITUR

Spain is an emerging market for California. This world travel trade show, based in Madrid, allows California, at low cost, to reach the Spanish travel trade.

EIBTM

The European incentive market is one of the most lucrative for California to address. Incentive groups represent high-end groups (typically awarded with extremely expensive vacations for exceptional sales or job performance) that seek expensive destinations and lots of amenities. Pound for pound, no travel market spends more or is more highly sought. Yet, California has

never gone after this lucrative clientele. Cities like Beverly Hills and Palm Springs have long had to go it alone in attracting this luxury class of travelers. California will test the waters by placing an informational booth at EIBTM in Switzerland.

Measurement

Program success is measured by private sector participation, travel trade participation at California seminars and special functions, and new packages developed and reported by participants.

Budget

CalTour: \$115,175

Familiarization Tours

Objective/Description

- Educate British, Dutch, German and Japanese tour operators and travel agents about California by showing them our product, first-hand, so that they become better educated about selling California travel.

Measurement

Assignment of qualified agents and tour planners by participating companies. Response from participating agents, tour planners and California destinations.

Budget

CalTour: \$0

Foreign Language Brochures

Objective

- Provide potential foreign visitors with important maps, travel tips and key travel information on California.
- Provide up-to-date information on California, in a variety of foreign languages, to the international travel trade.

Description

The State will update and reprint in German, Spanish, Portuguese, French, Italian and English a brochure to assist foreigners in planning a California vacation. Distribution will be 400,000 brochures. They will be given out primarily by USTTA offices, CalTour's international representatives, Governor's overseas offices and at international trade shows.

Measurement

Success of this element is measured by the quantity distributed over the next two years.

Budget

CalTour: \$20,000

Japanese Technical Tours Manual

Objective

- Provide Japanese tour operators with a comprehensive manual of technical tours.

Description

CalTour's Japanese Representation firm will produce a comprehensive guide to California technical tours.

Measurement

Success of this element is measured by the quantity distributed over the next two years.

Budget

CalTour: \$25,000

International Consumer Guide

Objective

- Provide expanded vacation planning information direct to consumers in English speaking markets, Spanish speaking markets and Germany.

Description

A foreign language consumer guide, produced by Greystoke, will be developed and distributed in select markets. The guide will be the first ever 8 1/2 x 11 format guide translated into English, Spanish and German. Distribution will take place in foreign, English speaking markets as we as Argentina, Mexico, Spain and Germany. Total cost of the piece is \$75,000 with approximately 50 percent being underwritten by advertising from travel industry partners. Total distribution will be in excess of 150,000 copies.

Measurement

Success of this element is measured by the quantity distributed over the next two years.

Budget

CalTour: \$35,000

Southern California International Marketing Group (SCIMG)

Objective

- Assist Southern California destinations and attractions with conducting regional marketing that serves to attract international visitation to this region.

Description

In its roles as catalyst and facilitator, CalTour has provided guidance and assistance to SCIMG, which is comprised of major DMOs and attractions in Los Angeles, Orange and San Diego Counties, for the purpose of helping them work together to bring international tourism to Southern California.

CalTour's advertising agency, J. Walter Thompson, has provided creative assistance in developing a campaign paid for by the SCIMG members to promote Southern California and CalTour's marketing agency has similarly provided marketing services.

Budget

CalTour: \$0

International Representation

Objective

- Provide daily contact with cooperative promotional partners and the travel trade in the distant foreign markets of the United Kingdom, Germany and Japan.
- Utilize internationally based marketing consultants to generate and implement more effective overseas promotions than can be created from the U. S.
- Assist the California private sector in obtaining increased exposure through special promotions in these three markets.
- Obtain support staff for purposes of assisting CalTour expand its exposure through the development and implementation of effective marketing components, such as education seminars, sales missions, trade exhibitions and familiarization tours.

Description

U.K./German Representation - In partnership with the convention and visitor bureaus of Los Angeles, Anaheim, San Francisco and San Diego, CalTour has retained the marketing services of MSTT (Supereps) in London, England and MSI (Marketing Services International) in Frankfurt, Germany. These firms will target the travel trade, developing new and maintaining current relationships with tour operators, travel agents and media representatives in an attempt to increase travel to California.

Japanese Representation - CalTour has retained the marketing services of InConTra in Japan to maintain relations with the Japanese travel trade and to assist Japanese consumers and the media in obtaining travel information about California. However, CalTour believes it should shift responsibilities at the end of the contract, due to the special nature of Japanese business development, to having state representatives in TCA's Tokyo offices.

Measurement

The value of these representative services is measured by the increased exposure California receives in tour operator brochures, media coverage and inquiries regarding travel to the State. It is also subjectively measured as to the effectiveness of each office in responding to requests for assistance from CalTour and the California travel industry.

Budget

CalTour: UK/Germany	\$130,000
C&VB Industry Support	\$130,000
CalTour: Japan Representative	\$112,500
CalTour: Japan TCA Office.....	\$37,500

Press Trips and Editorial Visits

Objective

- Communicate California story ideas to international consumer and travel trade journalists for use in key magazines, newspapers, television and radio stations.
- Visit key print and broadcast editors and reporters in the United Kingdom, and other markets with the goal of placing at least one major California story in each media outlet visited.
- Conduct press trips for individual journalists and group press trips of up to ten journalists to California from the State's primary and secondary markets.

Description

Ongoing media contact, generated from in-person visits and press trips, will be conducted during the year to assist in generating tourism gains from Europe, Japan and Canada. In many cases, media contact will be made through United States Travel and Tourism Administration (USTTA) offices on our behalf or initiated by CalTour travel trade representatives in Tokyo, London and Munich.

A "California Dream Days" press trip, conducted in cooperation with Air Canada, for Canadian travel writers is scheduled for October 19-25, 1995.

A press trip, conducted in cooperation with Virgin Atlantic Airways, for travel writers from the United Kingdom planned for October 24 - November 3, 1995.

Measurement

Programs will be evaluated via media visitation reports, news clippings and by placing an equivalent advertising dollar value to the articles generated as a result of an editorial visit or press trip.

Budget

CalTour:	\$0
Editorial Visits	\$0
Press Trips.....	\$0
Private Sector Support	In-kind contributions

Alliances

Visit USA Centers, Madrid and Belgium	\$
Travel Industry Association of America (TIA).....	\$1,500
Pacific Area Travel Association (PATA)	\$2,520
Society of American Travel Writers (SATW)	\$480
National Tour Association (NTA)	\$1,900
Alliance of Canadian Travel Association (ACTA).....	\$
Japan Association of Travel Agents (JATA)	\$
EcoTourism Society.....	\$
National Rural Tourism Foundation	\$
American Bus Association.....	\$

Conferences/Exhibitions

ESSTO	\$
TIA National Conference and Tourism Outlook	\$1,500
USTTA International Conference	\$2,520
CITAC, Carlsbad	\$
VUSAMart, Long Beach	\$5,000
Discover America Pow Wow, Los Angeles.....	\$100,000

CALIFORNIA DIVISION OF TOURISM
1995/96 Marketing Budget

Research	\$224,300
Collateral and Fulfillment	\$960,000
In-state Marketing	\$402,000
Domestic Marketing	\$3,019,000
International Marketing	\$1,213,000
Media Relations ⁵	---
Reserve	\$104,000
Subtotal of Marketing Programs	\$5,922,300
 Operating Budget	 \$1,603,200
 TOTAL CALTOUR BUDGET	 \$7,525,500

⁵ Program descriptions and budget details for Media Relations are located within the Domestic Marketing and International Marketing sections of the Marketing Plan.

Glossary of Terms and Acronyms

ABA - American Bus Association, comprised of bus companies, operators and owners.

AVHRM - Association of Vacation Home Rental Managers

Business Travel - Travel for commercial, governmental or educational purposes with leisure as a secondary motivation.

Buyer - a member of the travel trade who reserves room blocks from accommodations or coordinates the development of travel product.

Blocked - hotel rooms held without deposit.

Booked - hotel rooms, airline tickets or other travel services held for a specific client.

Carrier - any provider of mass transportation, usually used in reference to an airline.

California Conference on Tourism - an annual statewide tourism conference, jointly sponsored by CalTour and CalTIA.

California Tourism Marketing Act - The law which articulates the purpose of and authorization for California's travel industry to conduct industry self-assessment in order to fund statewide tourism marketing.

California Tourism Policy Act of 1984 - The law which articulates the purpose of and authority for, tourism marketing within California.

CABBI - California Association of Bed and Breakfast Innkeepers.

CALFEST - California Association of Fairs and Festivals.

CalTIA - The California Travel Industry Association, an industry association which represents all segments of California's travel industry.

CBA - California Bus Association.

CofCs - Chambers of Commerce specialize in local economic development and can include tourism promotion.

Charter Group - Group travel in which a previously organized group travels together, usually on a customize itinerary.

CH&MA - California Hotel & Motel Association.

CLIA - California Lodging Industry Association.

C&VB - Convention and visitors bureaus are local tourism marketing organizations which specialize in developing conventions, meetings, conferences and visitation to a city, county or region.

Cooperative Partner - an independent firm or organization which works with CalTour by providing cash or in-kind contribution to expand the marketing impact of the CalTour program.

Cover - each diner at a restaurant.

CTC - California Tourism Commission.

CTRLA - Car and Truck Rental and Leasing Association.

Destination - a hotel, resort, attraction, city, region or state.

Destination Marketing Organization - DMOs are local tourism marketing organizations, such as convention and visitors bureaus or chambers of commerce.

DMO - Destination Marketing Organization.

Domestic Program - Marketing done to promote travel by Californians within California. Both rural and urban regions of California benefit.

CalTour - California Division of Tourism, formerly the California Office of Tourism.

CalTour - California Division of Tourism, formerly the California Office of Tourism.

Fam Tours - organized trips for travel agents, tour operators, tour wholesalers or other members of the travel trade for the purpose of educating and "familiarizing" them with tourism destinations. By seeing the destinations that they are sending travelers, the travel trade is better prepared to answer customer questions and promote travel to the location. Also called "fams" or "familiarization tours."

Feeder Airport/City - An outlying city which feeds travelers to hubs or gateway cities.

FIT (Free Independent Travel) - Individual travel in which a tour operator has previously arranged blocks of rooms at various destinations in advance for use by individual travelers. These visitors travel independently, not in a group, usually by rental car or public transportation.

Frequency - the number of times an advertisement appears during a given campaign.

Gateway or Gateway City - A major airport, seaport, rail or bus center through which tourists and travelers enter from outside the region. San Francisco is a gateway, because of its international airport, seaport and ground services.

GIT (Group Independent Travel) - Group travel in which individuals purchase a group package in which they will travel with others along a pre-set itinerary.

Hub - An airport or city which serves as a central connecting point for aircraft, trains or buses from outlying feeder airports or cities.

Icon - A facility or landmark which is visually synonymous with a destination. California's most famous tourism icons include: the Golden Gate Bridge, the Hollywood sign, Yosemite's Half Dome, Yosemite Falls, palm trees, Venice beach, redwood trees and cable cars.

International Program - Marketing done to promote travel to California by residents of other countries. Both rural and urban regions of California benefit.

Leisure Travel - Travel for recreational, educational, sightseeing, relaxation and other experiential purposes.

Market Share - The percentage of business within a market category. For example, California held an 11.3% share of U. S. leisure travel in 1991. This means that of all Americans participating in leisure travel in that year, 11.3% did so in California.

Market Volume - The total number of travelers within a market category. For example, 194.6 million person leisure trip visits occurred in California in 1991.

NTA - National Tour Association, comprised of domestic tour operators.

Person Trip Visit - Every time a person travels more than 100 miles (round-trip) in a day or stays overnight away from his/her primary domicile, whether for business or leisure purposes, he/she makes one "person trip visit. " A family of four which travels from Sacramento to Lake Tahoe and back in a day would make four person trip visits. There were 259 million person trip visits in California in 1991.

Pow Wow - the largest international travel marketplace held in the United States, sponsored by TIA and USTTA.

Press Trips - organized trips for travel writers and broadcasters for the purpose of assisting them in developing stories about tourism destinations. Often, journalists travel independently, though with the assistance of CalTour and DMOs.

Press/Publicity Release - a news article or feature story written by the subject of the story for delivery and potential placement in the media.

Property - a hotel, motel, inn, lodge or other accommodation facility.

Reach - the percentage of people within a specific target audience reached by an advertising campaign.

Retail Agent - a travel agent.

Room Blocks - Several rooms held for a group.

Rural Region - California has been divided into twelve tourism regions, eight of which are defined as rural regions. They include: North Coast, Shasta Cascade, High Sierra, Central Valley, Gold Country, Deserts, Central Coast and the Inland Empire.

Sales Missions - Where California suppliers travel together to another state or country for the purpose of collectively promoting travel to California. Sales missions may include educational seminars for travel agents and tour operators.

Sales Seminar - an educational session in which travel agents, tour operators, tour wholesalers or other members of the travel trade congregate to receive briefings about tourism destinations.

Target Audience/Market - a specific demographic, sociographic or geographic target at which marketing communications are directed.

Target Rating Points - TRPs are a statistical measurement which allows one to evaluate the relative impact of differing advertising campaigns.

TIA - Travel Industry Association of America. The national counterpart to CalTIA.

TCA - California Trade and Commerce Agency, formerly the California Department of Commerce.

TOT - Transient Occupancy Tax.

Tourism - Leisure travel.

Tourist/Visitor/Traveler - Any person who travels whether for leisure or business purposes more than 100 miles (round-trip) in a day or who stays overnight away from his/her primary domicile.

Tour Operator - an individual or company that organizes and conducts packaged tours.

Tour Wholesaler - an individual or company that sells tour packages and tour product to travel agents. Tour wholesalers usually receive a 20% discount from accommodations, transportation companies and attractions and pass on a 10 to 15% discount to the retail agent.

Transient Occupancy Tax - TOT or bed tax is a locally set tax on the cost of commercial accommodations and campgrounds.

Travel Agent - an individual who arranges travel for individuals or groups. Travel agents may be generalists or specialists (cruises, adventure travel, conventions and meetings). Travel agents receive a 10 to 15% commission from accommodations, transportation companies and attractions for coordinating the booking of travel. They typically coordinate travel for their customers at the same or lower cost than if the customer booked the travel on his/her own.

Travel - Leisure and other travel including travel for business, medical care, bereavement, education, etc. All tourism is travel, but not all travel is tourism.

Travel Product - published tour and travel packages.

USTTA - United States Travel and Tourism Administration, the U.S. Department of Commerce's travel and tourism promotional agency. Its function is to promote travel to the U.S. from other countries.

WACVB - Western Association of Convention and Visitors Bureaus.